English Language
The upward curving lines of the World Intellectual Property Organization’s logo evoke human progress driven by innovation and creativity.

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Report on Task No. 50 by the PART 7 Task Force

*Document prepared by the Part 7 Task Force Leader*

## SUMMARY

The Part 7 Task Force has worked under Task No. 50 and reports on its activities since the last session of the Committee on WIPO Standards (CWS). This report includes the following:

* + The results of a survey to update Part 7.2.6 and Part 7.2.7 of the Handbook on Intellectual Property Information and Documentation;
  + A proposal to revise Part 7.3 of the WIPO Handbook; and
  + A draft survey questionnaire on citation practices in intellectual property (IP) offices to update Part 7.9 of the WIPO Handbook.

## BACKGROUND

At its ninth session in 2021, the CWS approved the revised work plan for updating Part 7 of the WIPO Handbook, including a survey on calendar dates in 2022. The CWS approved a simplified process for updating Part 7, whereby survey results would be collected and published directly, without requiring the questionnaire or results to be submitted to the CWS for formal approval. The CWS also requested the Task Force to schedule an update to Part 7.9 on citation practices. (See paragraphs 112 to 114 of document CWS/9/25.)

At its tenth session in 2022, the CWS was informed that the Secretariat had issued Circular C.CWS 162, inviting intellectual property (IP) offices to participate in a survey on the representation of calendar dates. The CWS also took note of the analysis of the responses received, as presented in document CWS/10/18.

At the same session in 2022, the CWS also considered and approved the updated work plan of the Part 7 Task Force, which is reproduced in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Section** | **Topic** | **Last**  **Published** | **Status** |
| Part 7.9 | Citation practices | 2008 | update 2023 |
| Part 7.6 | Bibliographic information in patent gazettes | 1990 | update 2023 |
| Part 7.2.6 and Part 7.2.7 | Application numbering – current practices & former practices | 2017 | update 2024 |
| Part 7.3 | Examples and kinds of patent documents | 2016 | update 2025 |

The CWS noted that the two planned surveys to update Part 7.6 and Part 7.9 of the WIPO Handbook would be conducted using the simplified process approved at its ninth session. Under this process, the results would be collected and published without presenting the questionnaire or the raw results to the CWS for approval. Instead, the analysis of the survey results would be submitted to the CWS for consideration and approval (see paragraph 114 of document CWS/9/25). The CWS will be informed of the published results at its subsequent session.

At its eleventh session in 2023, the CWS approved the update to the description for Task No. 50 which reads:

*“Ensure the necessary maintenance and update of surveys published in Part 7 of the WIPO Handbook on Intellectual Property Information and Documentation”.*

At the same session, the CWS agreed to postpone discussions on the revision of WIPO Standards ST.11 and ST.19. As a consequence, the CWS also decided to postpone the planned survey to update Part 7.6 of the WIPO Handbook. In addition, the citation practice survey, which would support the update of Part 7.9 of the WIPO Handbook, was postponed.

At its twelfth session in 2024, the CWS noted that the Part 7 Task Force would prepare a proposal to revise Part 7.3 of the WIPO Handbook for presentation at the thirteenth session. The CWS also approved the conduct of a survey to support updates to Parts 7.2.6 and 7.2.7 of the Handbook in 2025 and requested that the Part 7 Task Force report the survey results at the thirteenth session. (See paragraphs 43 and 44 of document CWS/12/29).

## Progress report on Task No. 50

### Objectives

The objective of the Part 7 Task Force is to maintain and update surveys published in Part 7 of the WIPO Handbook according to the work plan approved by the CWS.

### Relevant actions for 2025

The Part 7 Task Force held an online meeting on June 3, 2025, and agreed to work on the following items:

* + Conducting a survey to support updates to Parts 7.2.6 and 7.2.7 of the WIPO Handbook;
  + Drafting a proposal on the revision methodology for Part 7.3 of the WIPO Handbook, to be presented at the thirteenth session of the CWS; and
  + Revising the survey on citation practices in industrial property offices, with the aim of updating Part 7.9 of the WIPO Handbook and submitting it for approval at the thirteenth session of the CWS.

### Potential Challenges or Dependencies

The Task Force has identified the following challenges and dependencies that may affect the timely and effective completion of its work:

* + Limited participation from IP offices: Engagement in this task has been limited, potentially due to its lower prioritization by some IP offices. This may affect the diversity of input and delay progress on related activities; and
  + Dependence on survey participation: The quality and representativeness of the survey results are contingent on sufficient and meaningful responses from IP offices. A low response rate could limit the value of the data collected.

### Progress evaluation

Part 7 Task Force has completed the planned actions for 2025 mentioned above. The results of the Task Force activities are explained in detail below.

## Results of Survey on Numbering of Applications and Priority Applications – Current and Former Practices

On July 9, 2025, the Secretariat issued Circular C.CWS.199 inviting IP offices to provide information regarding both former and current practices related to the numbering of applications and priority applications. To collect the information effectively, two separate survey questionnaires were prepared: “*Questionnaire on Numbering of Applications and Priority Applications – Current Practices (related to WIPO Handbook Part 7.2.6)”* and the *“Questionnaire on Numbering of Applications and Priority Applications – Former Practices (related to WIPO Handbook Part 7.2.7)”.*

With regard to the “Questionnaire on Numbering of Applications and Priority Applications – Current Practices”, at the time of preparing this document, 37 IP offices provided their responses from the following 34 Member States: Austria (AT), Australia (AU), Algeria (DZ), Bulgaria (BG), Bahrain (BH), Brazil (BR), Canada (CA), China (CN), Costa Rica (CR), Czechia (CZ), Estonia (EE), Finland (FI), Georgia (GE), Germany (DE), Greece (GR), Hungary (HU), Israel (IL), Ireland (IE), Italy (IT), Japan (JP), Kenya (KE), Republic of Korea (KR), Kazakhstan (KZ), Lithuania (LT), Mexico (MX), Norway (NO), Paraguay (PY), Russian Federation (RU), San Marino (SM), Serbia (RS), Spain (ES), Sweden (SE), United Kingdom (GB), and Uruguay (UY); two regional IP offices: the Eurasian Patent Organization (EAPO) and the European Union Intellectual Property Office (EUIPO); and the International Bureau (IB) on the current numbering systems used under the PCT, Hague, and Madrid Systems. It should be noted that 12 of the 37 responding IP offices participated in the new survey for the first time.

With regard to the survey *“Questionnaire on Numbering of Applications and Priority Applications – Former Practices”*, at the time of preparing this document, 28 responses have been provided by IP offices from the 25 following Member States: Austria (AT), Australia (AU), Bahrain (BH), Brazil (BR), Canada (CA), China (CN), Costa Rica (CR), Germany (DE), Estonia (EE), Georgia (GE), Hungary (HU), Israel (IL), Italy (IT), Japan (JP), Republic of Korea (KR), Kazakhstan (KZ), Lithuania (LT), Republic of Moldova (MD), Poland (PL), Paraguay (PY), Russian Federation (RU), Slovakia (SV), Spain (ES), Sweden (SE), and United Kingdom (GB); two regional IP offices: the Eurasian Patent Organization (EAPO), the European Union Intellectual Property Office (EUIPO); and the International Bureau (IB) on former numbering systems used under the PCT, Hague, and Madrid Systems.

Sections 7.2.6 and 7.2.7 of the WIPO Handbook, published in 2017, contain information from 37 IP offices. In response to the recent survey conducted this year, 25 of those 37 IP offices responded to the surveys regarding their current and former practices of numbering applications and priority numbers while 12 IP offices have not. The Secretariat is in the process of encouraging those IP offices that have not yet replied to the survey to verify the currently published information regarding both their current and former practices related to the numbering of applications and priority numbers.

At the time of preparing this document, the Secretariat is working on updating Part 7.2.6 and Part 7.2.7 of the WIPO Handbook to reflect feedback received from IP offices. Once the updated Part 7.2.6 and Part 7.2.7 have been published, the Secretariat will inform the IP offices and encourage them to review the information.

## PROPOSAL FOR UPDATING WIPO HANDBOOK PART 7.3 EXAMPLES AND KINDS OF PATENT DOCUMENTS

Part 7.3 of the WIPO Handbook contains examples and kinds of patent documents issued by IP offices.

* + Part 7.3.1  contains a list of examples of patent documents published by industrial property offices grouped according to their ST.16 kind-of-document codes.
  + Part 7.3.2  contains an inventory of different kinds of patent documents ordered by the issuing industrial property office. ST.16 codes are provided for the listed documents along with information about the applicable patent legislation, publication details, specific application of the code and samples of first pages.

Traditionally, updates to Part 7.3 of the WIPO Handbook were carried out through periodic surveys distributed to IP offices. However, this approach has led to delays and infrequent updates, despite continuous changes in national or regional Offices’ practices.

As a follow-up to the decision by the CWS described in paragraph 8 above, the Task Force discussed how to update information available in Part 7.3 of the WIPO Handbook. As the outcome of the discussion, the Task Force proposes three options for updating Part 7.3 of the WIPO Handbook for consideration by the CWS, as outlined below. It should be noted that most Task Force members expressed a preference for Option 3.

1. *Option 1: Continue with the current survey-based update.*This option involves conducting regular and comprehensive surveys of all IP offices every few years to collect updated data.

Advantages:

* + Data collection would be structured and uniform;
  + Comprehensive snapshot as the surveys gather detailed, broad data at regular intervals;
  + Established process following the methodology that is familiar with clear governance and procedures; and
  + Controlled revisions as changes to the questionnaire are approved through the CWS.

Disadvantages:

* + The information in Part 7.3 of the WIPO Handbook may be outdated, as updates are only made after all IP offices complete a survey and the results are collected, analyzed, and processed. This can lead to delays in reflecting recent changes.
  + Conducting surveys can be resource-intensive and time-consuming, particularly for IP offices that have not changed their practices but are still required to respond.
  + Updates to the survey require CWS approval and cannot be implemented mid-cycle, resulting in inflexibility.

1. *Option 2: Adopt a fully ad-hoc update.* IP offices can submit information to update the WIPO Handbook Part 7.3, at any time without waiting for a formal survey cycle.

Advantages:

* + Timely updates through the immediate inclusion of new practices or changes reported by IP offices;
  + Increased flexibility by allowing IP offices to quickly report internal changes;
  + Reduced administrative delays by eliminating the need to wait for survey cycles or CWS approvals; and
  + Encourage continuous engagement from IP offices, promoting more frequent and proactive updates.

Disadvantages:

* + Risk of inconsistent participation as some IP offices may not update regularly, which would lead to uneven data coverage;
  + Some IP offices may require a formal request to initiate updates; and
  + Tracking challenges, as frequent or uncoordinated updates may make it harder to monitor changes over time, increasing the risk of oversight.

1. *Option 3: Implement a hybrid approach*. This approach combines periodically structured surveys (for example every four to five years) with an ad-hoc submission channel that allows Offices to provide updates as changes occur throughout the cycle.

Advantages:

* + Balanced flexibility and structure by enabling timely updates while preserving the benefits of comprehensive periodic reviews;
  + Encourages continuous engagement by allowing IP offices to submit updates as needed, while ensuring consistency in published information;
  + Captures emergent changes through ad-hoc updates, helping maintain complete and up-to-date data; and
  + Supports standardization through the use of predefined templates and procedures.

Disadvantages:

* + Requires additional coordination, as managing both ad-hoc and periodic update channels increases administrative complexity;
  + Potential for data conflicts, since ad-hoc updates may overlap or contradict information gathered through scheduled surveys; and
  + Need for structured processes, as templates and workflows must be developed and maintained to handle ad-hoc submissions effectively.

To facilitate the update of Part 7.3 of the WIPO Handbook, the Secretariat prepared a template for consideration by the CWS, including guidelines, which is reproduced in Annex I of the present document. The proposed template can be used with any of the three Options mentioned to in paragraph 20 above and it is prepared on the basis of the template previously used to collect information to update Part 7.3 of the WIPO Handbook (see C.CWS 50: <https://www.wipo.int/documents/d/cws/docs-en-circulars-files-cws-050.pdf>). Once the CWS has approved the proposed template, the Secretariat would explore suitable formats for the template such as an online submission form or a downloadable document and publish it in the WIPO Handbook website. In addition, the Secretariat proposes the following procedures, depending on the option approved by the CWS:

1. If Option 1 is approved, the Secretariat shall issue a circular, including the template, encouraging all IP offices to review their respective entries in Part 7.3 of the WIPO Handbook and confirm whether the information is accurate or requires updating. IP offices wishing to provide new information regarding the kind of patent documents shall also be encouraged to submit the relevant details to the Secretariat.
2. If Option 2 is approved, the Secretariat shall publish the template and guidelines under Part 7.3 of the WIPO Handbook. These materials will serve as a standardized tool for all IP offices to submit updates or new information as needed.
3. If Option 3 is approved, the Secretariat shall issue a circular, including the template, every four years encouraging all IP offices to review their respective entries in Part 7.3 of the WIPO Handbook and confirm whether the information is accurate or requires updating. IP offices wishing to provide new information regarding the kind of patent documents shall also be encouraged to submit the relevant details to the Secretariat. Additionally, IP offices can submit their updates or new information at any time, using the template which will be available in WIPO website, without waiting for the issuance of a circular.

## PROPOSAL for revising of the SURVEY CONCERNING CITATION PRACTICES IN INDUSTRIAL PROPERTY OFFICES

Part 7.9 of the WIPO Handbook provides examples of citation practices related to patent information. As this part of the WIPO Handbook was last updated in 2008, the Part 7 Task Force has prioritized its revision for 2025 in accordance with its work plan. The Task Force conducted a consultation for comments and suggestions on the draft revised survey posted on the wiki.

In addition, The Task Force received a request from the International Bureau to add a new section to the revised survey titled “Citing Documents Based on Machine Translations”. This follows discussions at the 2024 PCT Quality Subgroup Meetings in Geneva and Beijing, where concerns were raised about citing machine-translated documents. The new section aims to collect data on how IP offices handle such citations, providing a basis for possible updates to the PCT Guidelines and WIPO Standard ST.14.

The Task Force proposes the revised questionnaire on “Survey Concerning Citation Practices in Industrial Property Offices”, for consideration and approval by the CWS. The revised survey is included as Annex II, in this document and all changes made are tracked. Strike-through text indicates deletion and underlined text indicates addition.

The Task Force further proposes that the Secretariat conduct the “Survey Concerning Citation Practices in Industrial Property Offices” in 2026 and report the results to the fourteenth session of the CWS.

## WORK PLAN

The proposed work plan for 2026 is as follows:

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| **Section** | **Topic** | **Last**  **Published** | **Action Item** |
| Part 7.9 | Citation practices | 2008 | Conduct the approved survey questionnaire and update Part 7.9 |
| Part 7.3 | Examples and kinds of patent documents | 2016 | Update Part 7.3 based on the option approved by the CWS |

*The CWS is invited to:*

*(a) note the content of this document and the two Annexes to the present document;*

*(b) request its members and observers to verify the information published on Part 7.2.6 and Part 7.2.7 of the WIPO Handbook;*

*(c) consider and decide an Option to be used for updating WIPO Handbook Part 7.3, as referred to in paragraph 20 to above;*

*(d) consider and approve the proposed template, as referred to in paragraph 21 above and reproduced in Annex I to this present document;*

*(e) request the Secretariat to manage the update of WIPO Handbook Part 7.3, based on the Option approved by the CWS, as referred to in paragraph 21 above;*

*(f) consider and approve the proposed survey questionnaire on the citation practice, as referred to in paragraphs 22 to 25 above and reproduced in Annex II to this present document;*

*(g) request the Secretariat to issue a circular inviting all Offices to respond to the survey, and update Part 7.9, as referred to in paragraph 25 above; and*

*(h) consider and approve the updated work plan as indicated in paragraph 26 above.*

[Annex I follows]